

QUESTIONNAIRE Place an "x" in the proper column. If answer is "YES," please explain

YES NO

13. Is this the Record Copy of the series? ☒ []
14. Is there a duplication of this series in another office or agency? ☐ ☒
15. Is the information contained in this series ever summarized or published? ☐ ☒
16. Does the series contain classified information requiring security handling? ☐ ☒
17. Does the series document policies and procedures of agency's operation or function? ☐ ☒
18. Could the function be performed if the files were lost or destroyed? ☒ ☐
19. Is the series (or major portion of it) regularly microfilmed? If yes, why? ☐ ☒
20. Does the record series provide data as input to an EDP file? ☐ ☒
21. Does the record series contain documentation produced as EDP printout? ☐ ☒
22. Is the series affected by Federal or grant funds? ☐ ☒
23. Will there be a need for these records 10, 15 years from now? If yes, what? ☐ ☒

24. REQUIREMENTS. The following requires the files to be kept 5 years:

- a. ☐ STATE LAW b. ☐ STATUTE OF LIMITATION c. ☐ AUDIT PERIOD d. ☐ FEDERAL LAW e. ☒ ADMINISTRATIVE DECISION f. ☐ HISTORICAL VALUE

(Cite Law, Statute, or other reason for the retention requirement)

Georgia Industrial Loan Act requires loan companies to keep their records 4 years, and we feel that we should keep them at least one year more.

25. AGENCY RECOMMENDATIONS. This agency recommends that the file series be cut off at the end of each ☒ CALENDAR YEAR ☐ FISCAL YEAR ☐ OTHER, then:

A. ☐ Destroy immediately after cut off.

B. ☒ Hold in current files area 3 month(s) / 1 year(s), then:

1 ☐ Destroy.

2 ☒ Transfer to records center; hold 4 year(s), then:

a ☒ Destroy.

b ☐ Transfer historical material to Archives; destroy remainder.

3 ☐ Destroy after audit (or year(s) after audit).

C. ☐ Hold in current files area indefinitely.

D. ☐ Hold in current files area year(s), then transfer to Archives permanently.

E. ☐ Other

(Indicate briefly rationale for recommendations above/or write additional remarks):

(ATTACH SAMPLES OF THE SERIES WHEN POSSIBLE)

26. Inventory taken by
Virginia Adams

Recommendations prepared by
James E. Young

Approved for Disposition Date

Records Management Officer Date

Recommendations
in Paragraph 25
are:

<input type="checkbox"/> Approved	<input type="checkbox"/> Disapproved
<input checked="" type="checkbox"/> Approved	<input type="checkbox"/> Disapproved
<input type="checkbox"/> Approved	<input type="checkbox"/> Disapproved
<input checked="" type="checkbox"/> Approved	<input type="checkbox"/> Disapproved

Director, Archives & History	Date
Garroll Hart	11-22-71
Secretary of State	Date
James E. Young	11-22-71
Director, Georgia	Date
James E. Young	



31-07
X1

DEPARTMENT OF
ARCHIVES AND HISTORY
ATLANTA, GEORGIA 30334
DIRECTOR 656-2358
INFORMATION 656-2381
AREA CODE 404

December 7, 1971

SUBJECT: Records Disposition Standard

TO: COMPTROLLER GENERAL

ATTENTION: MICKEY ANDERSON, RMO

1. Enclosed (~~are~~) (**is**) approved Records Disposition Standards for the following files:

Quarterly Insurance Report Files, 1968 to Date

2. The following actions will be taken to implement the approved standard:

- a. Place the disposition standard on the file folder, file drawer, file cabinet or other type of container in accordance with the following example and enclosed labeling procedures:
QUARTERLY INSURANCE REPORT FILES (Insert Date of Files)
Cut off at end of CY; hold in current files area 1 yr., then transfer to records center; hold 4 yrs., then destroy.
- b. Transfer files to the records center, archives or dispose of them in accordance with the approved standard.
- c. Report surplus files equipment to this office.

3. Questions concerning implementation of the approved standard should be referred to this office (656-2379 or 2380).

John F. Dunn
State Records Management Officer
Archives and Records Building
Atlanta, Georgia 30334

Enclosures: 1. AR-50-71, Form for Disposition Standards
2. Labeling Procedures